8635/inst.

Department of the Treasury
Internal Revenue Service

Instructions for Form 8635
(June 1989)

Request for Federal Income Tax Forms for Libraries

1. Account Number
Preprinted by IRS. Please refer to this number when placing an order or making an inquiry.

2. Survey Date
Preprinted date of survey.

3a. Current Address
Make sure that the address information printed on your survey order form is correct. If any information is incorrect, changes should be made in section **3b.**

3b. Address Change
Complete this section **only** if the address in section **3a** is incorrect. Fill in only the information that is incorrect or needs to be added.

We must have a street address for United Parcel or tractor trailer shipments. **Please do not use post office boxes.**

4a. Current Contact Name and Telephone Number
This is the current contact person's name and telephone number on our files. If this is incorrect, make corrections in section **4b.**

4b. Corrected Contact Name and Telephone Number
Complete this section **only** if the contact person or telephone number has changed or there is no information in section **4a.**

5. 1040 Family
We have preprinted in block five (Form 8635), the quantity of Forms 1040 ordered on your Form 8635 last season. If that quantity **does not meet your needs,** refer to **Table 1, 1040 Plan Structure,** to determine the quantity of Forms 1040 that best meets the demand of your patrons. Please indicate the changed quantity of Forms 1040 needed in the box directly below the quantity that you ordered last year.

Several of the 1040 plans have been modified for this year. Some adjustments have been made in the ratio of 1040A, 1040EZ, and 1040 Schedules A&B. These were made as a result of changing usage for these forms as indicated in recent Taxpayer Usage studies. Refer to **Table 1, 1040 Plan Structure,** to review the modified plan quantities.

Table 1 - 1040 Plan Structure lists only the quantity of the six 1040 items through plan 15. Higher plans may be ordered. For each increase in plan number, after Plan 7, the 1040 quantity increases by 3000. 1040A, 1040EZ, 1040 Schedules A&B, 1040 Instructions and 1040A/1040EZ Instructions are also increased proportionately.

Alaska Customers
Customers in Alaska have stated that most residents of their state file a Form 1040. Therefore, if the Plan Structure in Table 1 does not meet your needs, order the items that you need individually on the back of Form 8635.

Table 1 - 1040 Plan Structure

	1040	1040 A	1040 EZ	1040 A & B	Inst. 1040	Inst. 1040 A&EZ	Est. Total Cartons
Plan 1	50	30	30	30	20	30	1
Plan 2	100	75	75	75	30	45	1
Plan 3	300	250	250	150	45	50	1
Plan 4	500	350	350	400	90	80	2
Plan 5	1000	750	750	600	140	150	3
Plan 6	1500	1000	1000	800	165	225	4
Plan 7	3000	1500	2000	1500	330	450	8
Plan 8	6000	3000	3000	3000	660	900	15
Plan 9	9000	4500	6000	3000	990	1350	22
Plan 10	12000	6000	6000	6000	1320	1800	29
Plan 11	15000	7500	9000	6000	1650	2250	36
Plan 12	18000	9000	9000	9000	1980	2250	41
Plan 13	21000	10500	12000	9000	2310	2700	48
Plan 14	24000	12000	12000	12000	2640	2700	53
Plan 15	27000	13500	15000	12000	2970	3150	61

6. Special Program Items
Important!! There will not be any automatic distributions of the special program items listed in section 6. You will receive **only** the amounts you specify for each item. However, each kit will contain one copy of Publication 1132, a binder, and Publication 1194.

The Library Kit is designed to provide Librarians with various reference materials. Printing schedules make it necessary for distribution of the kits to be made in two or three shipments. The kit that you receive will contain Publication 1132 and Supplement, all volumes of Publication 1194, binders, a selection of IRS publications, posters, bookmarks, prior year order blanks and any additional items that contain changes affecting the taxpayer. We will provide a listing of the Library Kit contents in a newsletter sent in the first kit mailout.

7. Additional Major Tax Forms
The most frequently requested major tax forms have been arranged into five groups. Refer to Table 2, Additional Major Tax Forms, for the contents and quantity of forms included in each group. **The request for multiple groups will result in several cartons containing the same mix of forms.** If you need a quantity different from any that are available in a group, order the quantity of each form that you need on the back of Form 8635.

The items included in the Additional Major Tax Forms groups have been modified. Forms 3468 and instructions and 4684 and instructions have been deleted. Form 2119 and instructions and Schedule F (Form 1040) have been added.

We have also changed the quantity of each item to reflect the filing patterns of individuals.

T 22.51:

READEX FICHE best copy available

If you require additional forms or publications, refer to the enclosed Publication 1280.

The Additional Major Tax Forms in the five groups include the following:

1040 Sch. C.....Profit or Loss from Business
1040 Sch. D.....Capital Gains and Losses
1040 Sch. E.....Supplemental Income and Loss
1040 Sch. F.....Farm Income and Expenses
1040 ES.....Estimated Tax for Individuals
1040 Sch. R & Inst...Credit for the Elderly or Disabled
1040 Sch. SE.....Social Security Self-Employment Tax
1040X & Inst.....Amended U.S. Individual Income Tax Return
2106 & Inst.....Employee Business Expense
2119 & Inst.....Sale of Your Home
2210 & Inst.....Underpayment of Estimated Tax by Individuals and Fiduciaries
2441.....Credit for Child and Dependent Care Expenses
3903 & Inst.....Moving Expenses
4562 & Inst.....Depreciation & Amortization
4797 & Inst.....Sales of Business Property
4868.....Application for Automatic Extension of Time to File U.S. Individual Income Tax Return

8. Facilities to Receive Truck Shipments
It is cost beneficial to send large shipments via tractor trailer. If inside delivery is necessary, it is authorized by the IRS. Just simply request it from the delivery person.

If you do not have facilities to receive motor freight, please check the "no" box.

9. Branches
This item should only be completed by Public Libraries ordering for, and distributing to, branches within their Library system.

10. Remove
Check only if this account is a duplication of another existing account, if you are consolidating ordering points, or if you are withdrawing from the program.

General Information
Shipments of some 1040 plans will be sent directly from the printers. You may receive forms and instructions separately. If you do not receive the 1040 family, 1040, 1040A, 1040EZ, Schedules A&B, and instructions by December 20, please call the **hotline 1-800-221-1535.**

Many of the Additional Major Tax Forms are not available until later in the season. They will be sent to you as soon as they are available.

Please do not furnish the hotline number to your patrons. We are set up to fill bulk requests for entities in the BPOL program only. Individuals should call their orders in to 1-800-424-FORM (3676).

Table 2 - Additional Major Tax Forms

	A	B	C	D	E
1040 Sch. C	25	50	100	250	500
1040 Sch. D	25	50	100	300	500
1040 Sch. E	25	50	100	250	500
1040 Sch. F	10	20	30	50	100
1040 Sch. R	10	20	30	50	100
1040 R Inst.	5	10	15	20	30
1040 Sch. SE	25	50	100	250	450
1040 ES	25	50	100	150	250
1040 X	25	25	50	150	250
1040 X Inst.	10	10	20	50	100
2106	10	20	30	50	100
2106 Inst.	5	10	15	20	30
2119	10	20	30	50	100
2119 Inst.	5	10	15	20	30
2210	10	20	30	100	200
2210 Inst.	5	10	15	30	50
2441	15	25	50	150	250
3903	10	20	30	50	100
3903 Inst.	5	10	15	20	30
4562	25	50	100	300	500
4562 Inst.	10	20	30	100	200
4797	10	20	30	50	100
4797 Inst.	5	10	15	20	30
4868	25	25	50	150	250